



SOY
CANADA

ANNUAL REPORT

2022-2023

Soy Canada

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SOY CANADA LEADERS



Brian Innes
Executive Director

From the Executive Director’s desk:

This year saw the vitality of the soybean reflected in the life of Soy Canada, with our members engaging like never before to grow their businesses and the prosperity of the whole industry. From the launch of Sustainable Canadian Soy to our record setting Indo-pacific mission that connected with more customers than ever, members saw firsthand the advantage of creating value through collaboration. Our work together united us in the face of numerous challenges at home and abroad such as creating a level playing field for domestic biofuel markets to resolving issues to access international markets. As you read this report, I hope you see your work and the future of the soybean industry shining bright.

Brian Innes
Executive Director



Jason McNaughton
Chair

From the Chairperson’s desk:

Providing food, thanks to the good graces of mother nature helps us look forward. The past year allowed us to look forward with confidence as we met strong demand with strong production and regained our stride by re-engaging in many activities. Record yields in Western Canada and favourable harvest conditions across Canada provided a bountiful high-quality crop for the benefit of the whole industry. Our members and board also engaged significantly to shape the future of our industry’s market development, food grade research and sustainability efforts. As we enter our tenth year, I see an organization and expanded board bringing diverse perspectives to the table to help us continue moving forward with confidence.

Jason McNaughton
Chair



OUR BOARD

Left to right: Ernie Sirski (Manitoba Pulse and Soybean Growers), Jeff Loessin (Vice Chair, Corteva Agriscience), Ramzy Yelda (Producteurs de grains du Quebec), Jason McNaughton (Chair, Hensall Coop), Winston Van Staveren (Saskatchewan Pulse Growers), Michelle Wall (Syngenta), Crosby Devitt (Grain Farmers of Ontario), Scott Persall (Grain Farmers of Ontario), Mark Jorgensen (Demlar Commodities)
Missing: Melvin Rattai (Secretary-Treasurer, Manitoba Pulse and Soybean Growers), Jeff Stonehouse (The Andersons Canada)

INDUSTRY LEADERSHIP



Each year presents new and ongoing challenges to expand Canada's soybean industry and global exports. Soy Canada, along with the help of our members, provides leadership and a voice for Canadian soybeans.



Container shipping advocacy continues

One of the ongoing challenges facing the Canadian soybean value chain is ensuring our soybeans reach their destination efficiently and cost effectively. Container shipping issues continue to plague exporters, especially outdated legislation that exempts shipping lines from competition law. To address this issue, Soy Canada contributed to the Supply Chain Task Force, coordinating with like-minded stakeholders to amplify our concerns. Our efforts led to meetings and elevation of the issue with Transport Canada, the Competition Bureau, and Agriculture and Agri-Food Canada. We were invited to raise our concerns with the Minister of Transport as well as the Ministers of Agriculture and Innovation Science and Economic Development. Our efforts have yielded results with the announcement in Budget 2023 that the Shipping

Conferences Exemption Act will be reviewed and the Minister of Innovation, Science and Industry asking the Competition Bureau to investigate container shipping lines – both important steps to improving future shipping service.

Member engagement & activities

Soy Canada continues to be the go-to hub on all soybean related topics, including market access, trade issues and opportunities, market development, as well as research and innovation. This year we focused on purposeful engagement with our members and board of directors, organizing opportunities for shared insight and informed plans for the future. Soy Canada member engagement activities included:

- **More than 25 peer to peer meetings representing over 550 person hours** of discussion bringing members together to discuss issues like gene editing commercialization, the future of the Harrow soybean quality program as well as our future market development and market access efforts. Engagement resulted in value chain alignment, focussed work where Soy Canada adds value and better information to inform individual business decisions.
- **Monthly member newsletter** – growing in popularity, this valuable resource is **sent to 140 members**, providing industry insights and updates
- **SoyCanada.ca** – an **information hub for domestic and international customers** seeking information and supplier connections with over 100 trade leads circulated to members



MARKET DEVELOPMENT & BUILDING DEMAND FOR CANADIAN SOYBEANS

The growth of Canada's soybean value chain relies on our customers appreciating the value our soybeans provide to their business. Soy Canada is committed to supporting our exporters in promoting Canadian soybeans to domestic and international customers.

Expanding business in the Indo-pacific

In-person market development missions resumed in 2023, with a delegation of 26 Soy Canada member representatives, including producers, exporters, the Canadian Grain Commission and Agriculture and Agri-Food Canada. The mission connected the Canadian soy value chain directly with customers in Japan, Malaysia and Vietnam in February 2023, to share the latest about Canadian soybeans and hear what's most valuable to them. Delegates met with more than 220 current and potential customers through a series of seminars, tours and business to business networking events in each country. Topics discussed ranged from quality specifications Japanese customers are looking for, the reliability of Canadian infrastructure and transportation of soybeans to Malaysia, to discussing sustainable solutions and market access challenges facing Canadian soybean exports to Vietnam.



Virtual value chain engagement

Building on the success of last year, Soy Canada hosted another virtual Southeast Asian market development seminar in March 2023. The event was live streamed in local time for customers in Indonesia, Philippines, Singapore, Taiwan and Thailand as well as Soy Canada members in Canada, attracting over 70 participants. The theme of the event, *Delivering Quality, Sustainability and Trust* supported Soy Canada's launch of the Sustainable Canadian Soy program. Presentations included industry insights from a Canadian grower (Winston van Staveren from Saskatchewan) and exporter (Garth Baxter from AgriBax Global Inc.), the latest on soybean quality research, and an in-depth soybean value chain update by Ramzy Yelda from Producteurs de grains du Quebec.



Developing a sustainable future

The last year saw the soybean value chain go from talk, to action, to implementation of [Sustainable Canadian Soy](#). With growers working side-by-side with exporter members to meet market needs, it's the next step to keep pace with global competition and maintain market access. In March 2023, the Sustainable Canadian Soy program was launched with a Canada-wide virtual event that included

a live Q&A with Brian Innes, Soy Canada Executive Director, a soybean grower Scott Persall



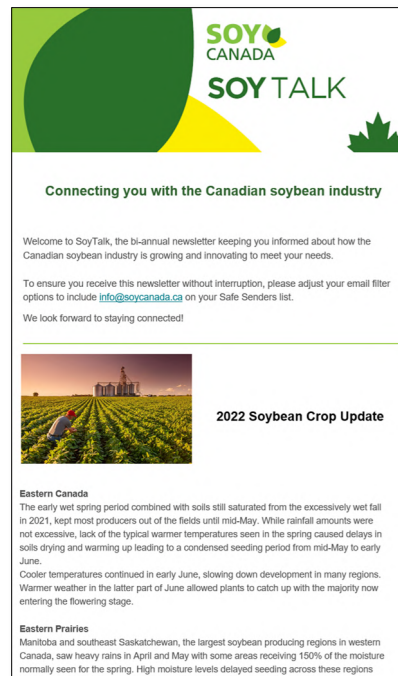
**SUSTAINABLE
CANADIAN SOY**

and Canadian exporter Matt Renkema. The launch was an important milestone since Soy Canada started consultations in 2021 to develop a program designed to meet customer needs for verified sustainable soybeans. The program is available for the 2023 growing season and utilizes the Farm Sustainability Assessment (FSA), a globally recognized whole farm sustainability benchmarking and assessment program that focuses on meeting customer needs and values. Sustainable Canadian Soy is managed by participating grain exporters and handlers serving customers asking for sustainability verification.



Talking Canadian soy with customers

Soy Talk, a new customer-focused electronic newsletter was launched this year to keep domestic and international audiences engaged and informed about Canada's soybean value chain. With more than 300 subscribers, Soy Canada continues to build our newsletter database, signing up interested subscribers from outgoing and virtual mission participants. A bi-annual newsletter, each issue features timely planting, growing and harvesting updates, program announcements, like Sustainable Canadian Soy, and promotion of [SoyCanada.ca](#) where customers can find suppliers, explore the variety finder database, and more.





PRIORITY

MARKET ACCESS & TRADE POLICY



Delivering the best soybeans in the world requires stable and open access to global markets. Soy Canada works on behalf of members to remove trade barriers while advocating for beneficial trade policies and agreements to have access to global market that provide the greatest value for Canadian soybeans.

Preventing, resolving and expanding access to global markets

Soy Canada works diligently to maintain momentum on existing issues and act on emerging concerns. Here's a look at the market access, trade negotiations and actions covered over the past year.



Association of South East Asian Nations

Ongoing negotiations toward a trade agreement continued.



China

Database of eligible Canadian soybean exporters updated, enabling two more members the ability to export to China.



European Union

Advocated for practical implementation of impending deforestation free supply chain requirements.



India

Advocated for tariff free access for soybeans through the Canada-India Early Progress Trade Agreement.



Indonesia

Engaged to achieve equal access for Canadian soybeans to government procurement agency tenders, after soybeans from other origins were initially favoured.



Japan

Coordinated industry and government for a smooth transition to new mandatory phytosanitary certificates.



Malaysia

Shipments delayed due to unpredictable and unrealistic GM testing were released after successfully clarifying testing thresholds.



United Kingdom

Trade negotiations continue, with an agreement expected by the end of 2023.



Vietnam

Achieved an industry-wide consensus to improving market access and conducted meetings in market to resolve current issues related to creeping thistle.

Monitoring changing market requirements

Soy Canada provides quarterly updates on changes to maximum residue levels (MRLs) for crop protection products in key soybean markets to exporter members. In October 2022, a proactive monitoring assessment of the status of 20 actives in the European Union was conducted and reported to exporters.



Soy Canada is a proud member of the Canada Grains Council who leads on issues of common interest across the grains industry such as seed innovation and crop protection policy.





PRIORITY



COORDINATE RESEARCH & INNOVATION

Research and innovation drive our soybean sector, and continued investment will grow the future of Canadian soybeans. Soy Canada coordinates and aligns priorities, advocates for funding, and supports collaboration to enable our industry to maintain our ability to produce the highest quality soybeans worldwide.

Supporting a renewed Harrow soybean quality program

Canada’s own Harrow Research and Development Centre is a valuable and internationally respected program on the cutting edge of food grade quality testing. Over the past year, Soy Canada engaged members to chart the path for how the program can add value to the soybean industry. Members shared how the program can add value to their business, by helping customers appreciate the value of Canadian food grade soybean varieties for their food manufacturing operations. The result was a new 2023-2026 funding model to provide value-added services to members, that helps the industry provide growers new varieties quicker.

and the Canadian Field Crop Research Alliance to have active alignment and engagement of where research investment by Agriculture and Agri-Food Canada can provide the greatest value.

Variety Finder expands to serve customers

Soy Canada’s new online [Variety Finder](#) launched in 2022 and continues to expand to meet customer demand. Over the past year, Manitoba and Quebec quality data has been added, increasing the total number of database samples to a total of 1,091. The current food grade soybean variety finder now highlights more than 100 varieties. This popular online feature coordinates soybean variety trials and quality across Canada to help customers adopt new varieties quicker, which then helps growers have the latest high performing food grade varieties on their farms faster than ever.



Food Grade Soybean Variety Finder



Future research funding

With 2023 marking the start of the next national soybean research cluster, Soy Canada worked with our members



OUR GOALS & STRATEGIC PRIORITIES

Double production in the next decade



	2016	2022 results	2027 target
Total seeded acres	5,467,100	5,274,200	10,000,000
Yield (bushels/acre)	44.1	45.9	48.2

Source: Statistics Canada

Build on Canadian soybeans' contribution to natural capital



- Improve the natural environment that supports our industry
- Be recognized in Canada and around the world as a global leader in sustainable production of high-quality soybeans

Increase world-leading high-quality food grade production by 25%



	2016	2022 results	2027 target
Food grade production (tonnes)	1,250,000	1,350,000	1,800,000
Food grade seeded acres	1,000,000	1,130,000	1,250,000

Source: Statistics Canada (non-genetically modified seeded acres)

Increase competitiveness, exports and processing of commodity soybeans



	2016	2022 results	2027 target
Eastern Canada protein (13% moisture)	40.6% (35.3%)	38.9 (33.8)	41.1% (36%)
Western Canada protein (13% moisture)	38.7% (33.7%)	38.9 (33.8)	40.2% (35%)

Canadian Grain Commission, Quality of Canadian oilseed-type soybeans, composite

OUR MEMBERS

